Module 2

Chapter 2

Managing Positions

Chapter Overview

Introduction

This chapter contains information for managing positions in the database. It includes procedure steps for retrieving, validating, quick copying, as well as correcting and updating encumbered and unencumbered positions. It also outlines how to terminate and delete positions. Instructions for managing positions in position hierarchy are discussed in this module in Chapter 3.

Chapter Contents

Querying Positions

Purpose

This section guides you through the querying options for retrieving previously built positions and verification of whom occupies the positions.

Section Contents

- Accessing the Position window
- Querying All Positions in the Database
- Querying a Specific Position
- Verifying Who Occupies the Position

Before You Begin

Examples of when you will use this procedure:

- You start to build a position, but get interrupted before you validate it.
- You want to quick copy a position in the database.

You can query on the **Position** window by clicking any of these data fields:

- ***Name***
- ***Job***
- ***Organization***
- ***Location***

Querying Positions

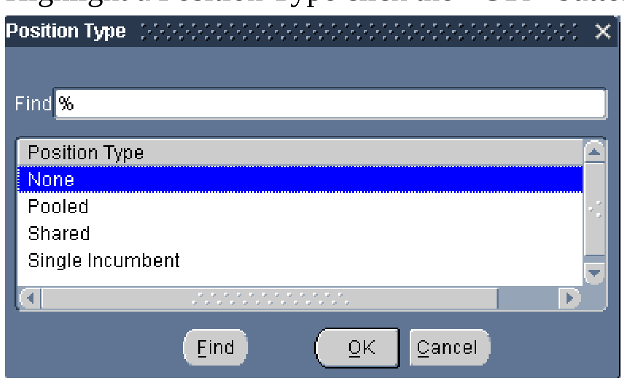
Querying All Positions in the Database

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path → <i>Work Structures</i> → <i>Position</i> → <i>Description</i> → <Open>.</td></tr>
<tr><td>2</td><td>The Find Position window opens. To Query all positions with in the Data base click the <FIND> button.


When the Position window opens scroll through the positions with the up or down arrow keys until you reach the position you need.</td></tr>
</table>

Querying a Specific Position

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1A</td><td>To Query a specific position perform any of the following procedures:
Place cursor in the Type field and click the LOV's icon to open the Position Type window.

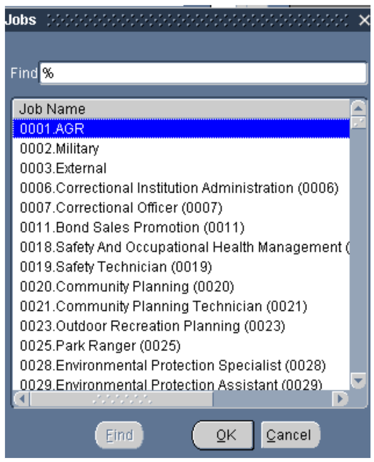

Highlight a Position Type click the <OK> button.


Then click the <FIND> 
 button. Oracle will then retrieve all positions with that Position Type.</td></tr>
</table>

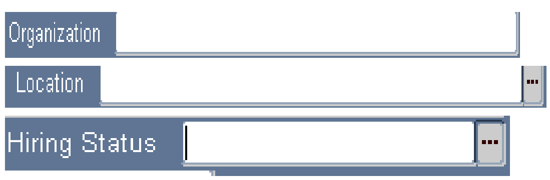
Querying Positions

Querying A Specific Position (Continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1B</td><td>Place the cursor in the Job data field, click the LOV’s icon to open the Job window.


Highlight a JOB click the <OK> button.


Then click the <FIND> 

button. Oracle will then retrieve all positions with that Job Type.</td></tr>
<tr><td>2</td><td>Repeat the Process described in 1A, and 1B. By placing the cursor in any of the data fields found on the Find Position window and utilizing the LOV’s to make you selection. You can query any multiple combinations of Positions.


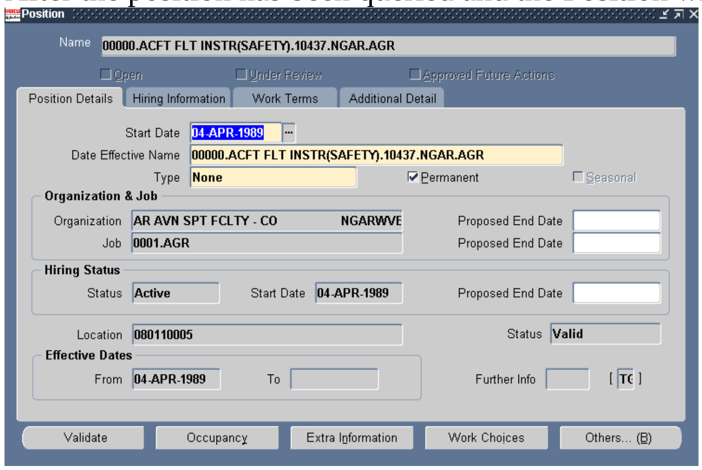
Always conclude the Query by clicking the <FIND> button.</td></tr>
</table>

Querying Positions

Verifying Who Occupies the Position

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

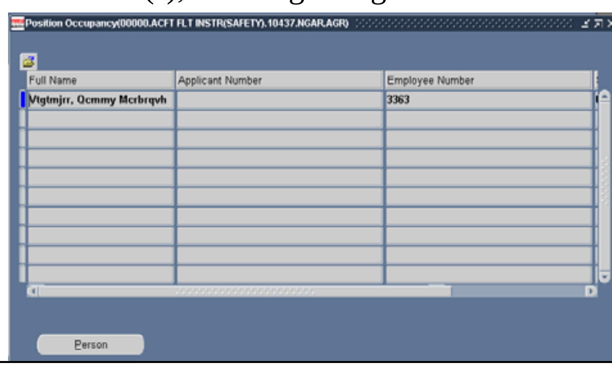
After the position has been queried and the Position window opens.



To verify who encumbers this position, click the **<Occupancy>** button at the bottom of the window.

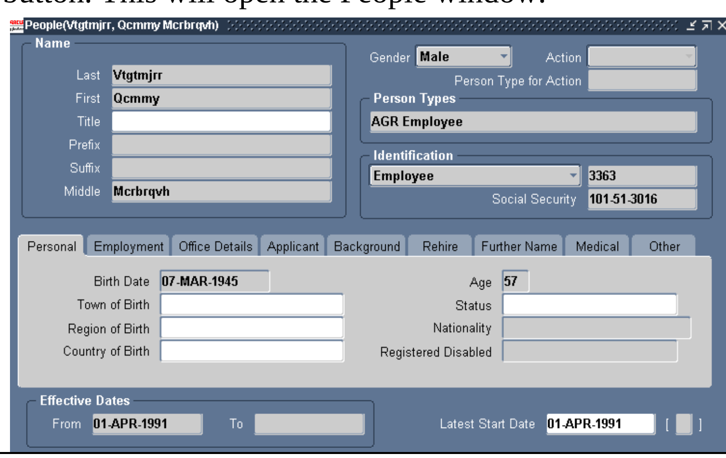
</td></tr>
<tr><td>2</td><td>

The **Position Occupancy** window displays the current or past incumbent(s), with beginning and end dates for each.



</td></tr>
<tr><td>3</td><td>

To retrieve more information on the incumbent click the **<PERSON>** button. This will open the People window.



</td></tr>
</table>

Validating an Invalid Position

Purpose

This procedure shows how to validate an invalid position and change the status to “valid”.

Note: Only validated positions can be used with the RPA.

Section Contents

- Querying the Invalid Position
- Validating the Position
- Making Corrections if the Position does Not Validate

Before You Begin

- When building or changing position data in the **Position** window, the status of the position is “Invalid” until all required data is entered and all business rules are met.
- When you click the <**Validate**> button, the system applies business rules that check the data for errors and inconsistencies. For example, if the Grade and FLSA designations are not compatible, an error message will appear. You must then correct the information and validate the position.
- Once the position is “Valid,” remember to link it to the position hierarchy. (See Chapter 3 in this module)
- After you validate the position, you can use it when processing position-related RPAs.

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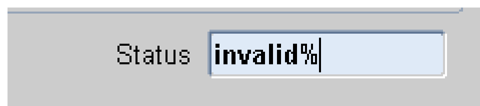
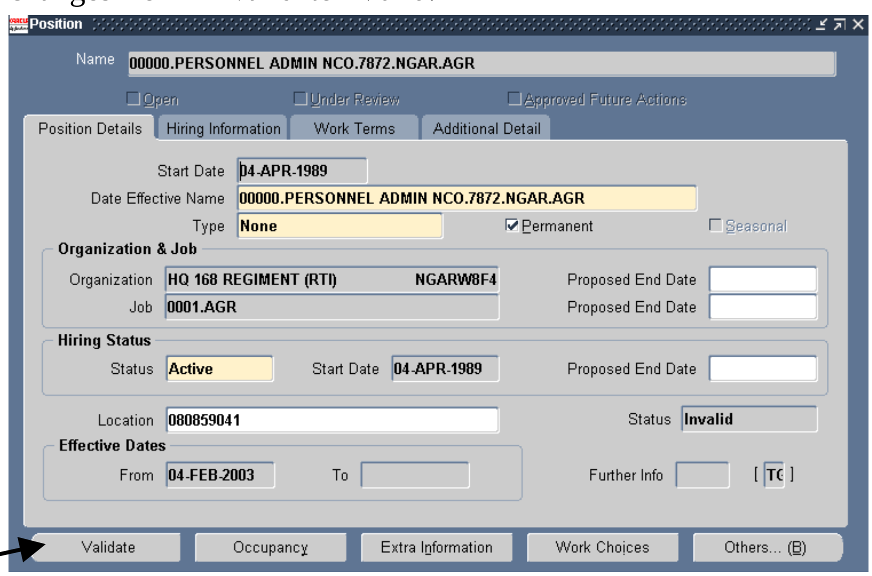
Validating an Invalid Position, Continued

Querying the Invalid Position

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path → <i>Work Structures</i> → <i>Position</i> → <i>Description</i> → <Open>.</td></tr>
<tr><td>2</td><td>The Find Position window opens, Close this window by clicking on the X in the right hand corner of the box.

Note: Do not click in the Name data field. It will bring up the Position Flexfield and generate a new system number.</td></tr>
<tr><td>3</td><td>Press the F11 key to begin query, click the cursor to the Status data field.</td></tr>
<tr><td>4</td><td>Type in the word Invalid and a % sign in the data field.


Press the F11 button and the CTRL button together to execute the query.</td></tr>
<tr><td>5</td><td>Once you have located the position and you are in the Position window, click the <Validate> button. If there are no inconsistencies or errors in the position, the <i>Status</i> data field changes from “Invalid”to “Valid.”


Click the Save icon in the main menu bar.</td></tr>
</table>

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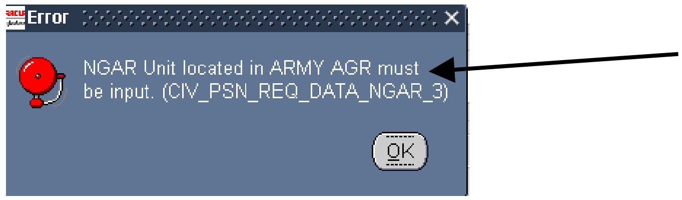
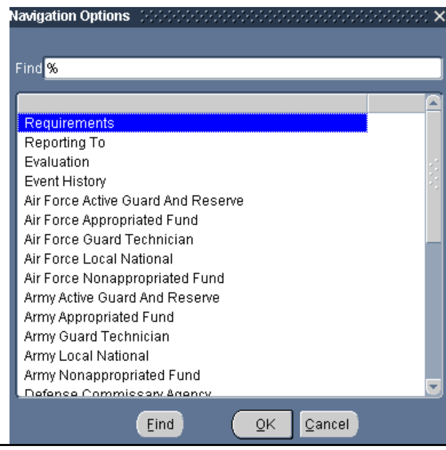
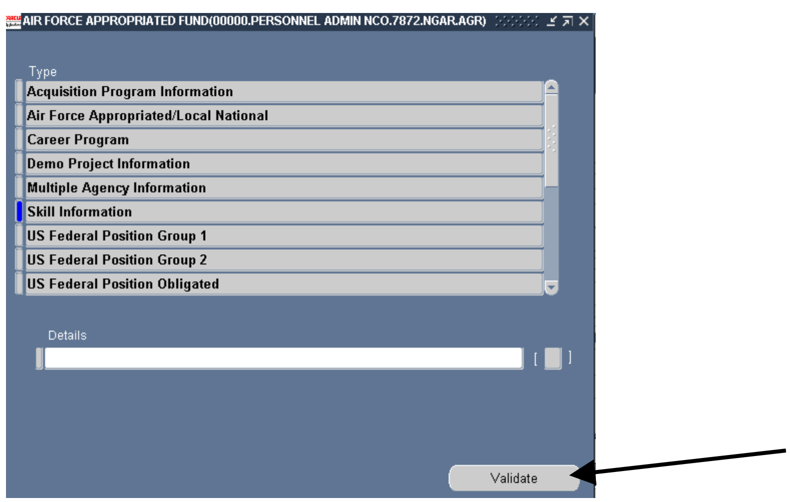
Validating an Invalid Position, Continued

Making Corrections if the Position Does Not Validate

Step	Action
6	If the position doesn't validate, you will receive an Error message.  The error message informs you what needs to be corrected
7	Click <**Others**> button at the bottom of the window. To open the Navigation Options window. 
8	Select the appropriate Option and click the **<OK>** button
9	As a convenience, the <**Validate**> Taskflow button also appears on the **Extra Information** window.  After correcting the information in the flexfields, Save your work then click the <**Validate**> button.

Quick Copying a Position

Purpose

This procedure shows you how to Quick Copy up to 10 copies of a validated position.

Section Contents

- Querying the Position to Copy
- Making Job or Organization Changes
- Modifying and Quick Copying
- Using Cut and Paste Method for Querying
- Validating the Quick Copied Position (s)

Before You Begin

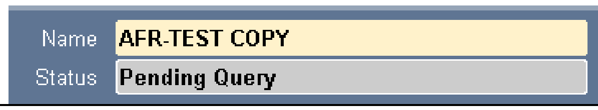
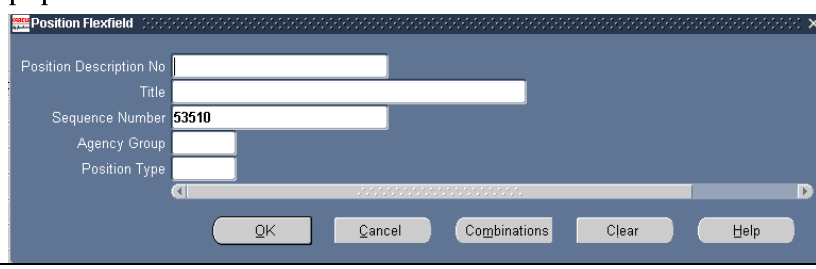
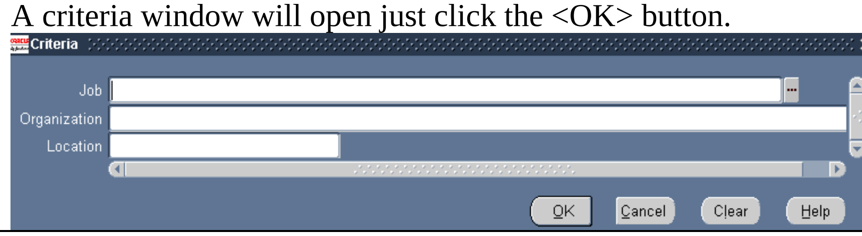
- If you are making a Quick Copy of a position, you need to know how to retrieve it. It must also be a valid position. On the **Position** window at the ***Name*** field, query the position using one or more of the following unique position identifiers:
  - PD Number
  - Sequence Number
- You will need to validate each position that you Quick Copy.
- You can Quick Copy:
  - Similar positions and make the minor changes needed before validating.
  - An encumbered or vacant position.
  - Other "Quick Copied" positions.

Accessing the Position Copy Window

Step	Action
1	**Navigation Path** *Work Structures → Position → Position Copy*. The Position Copy window opens with two tabs, **Original** and **New:** 

Quick Copying a Position

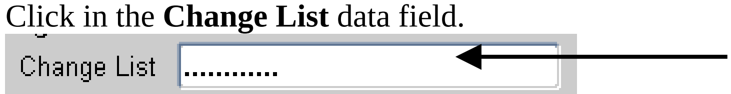
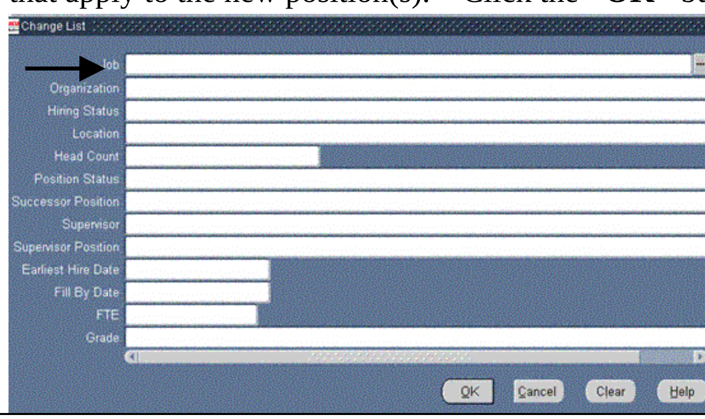
Querying the Position to Copy

Step	Action
1	In the **Position Copy** window, Type in a name in the ***Name*** data field to identify the set of position(s) to be copied. Enter a name even if you are going to copy only one position. For Example, use your initials, date, ***Position Title***, etc. 
2	The ***Effective Date*** populates with the current date. • It applies to all the positions that you query. If you do not enter a date, the system uses the current date. Change the ***Effective Date*** if you want a date that corresponds to the position to be copied.
3	In the Position window click in **Position Name** data field.  The **Position** Flexfield window opens with the ***Sequence Number*** populated. 
4	Enter the *Sequence Number* you wish to query and click the **<OK>** button.
5	A criteria window will open just click the <OK> button. 
	The **Position Copy** window opens with "Pending Query" in the ***Status*** data field at the top, and ***Position Name*** populates with the ***Sequence Number*** under the **Selection Criteria**

Continued on next page

Quick Copying a Position, Continued

Querying the Position to Copy (continued)

Step	Action
6	Enter the number of copies needed in the ***Default Copies*** data field. 
7	Click the <**QUERY**> button to execute. 
	The **Position Copy** window displays the retrieved record(s) in the ***Status*** data field. The position data populates in the columns: **Copies, Position Name, Status, Job Description, Organization Description, Hiring Status**, etc. **Note:** The number of copies you entered displays under ***Default Copies*** data field and the **Copies** Column.
8	Click on the **New** Tab. 
9	Click in the **Change List** data field. 
10	The **Change List** window opens: Change any of the data fields that apply to the new position(s). Click the <**OK**> button. 
11	After making all necessary changes click the<**Create New**> button on the upper right side of the window. 
12	A Note Message Box displays: "Pending record(s) created on New Tab." Click the <**OK**> button.

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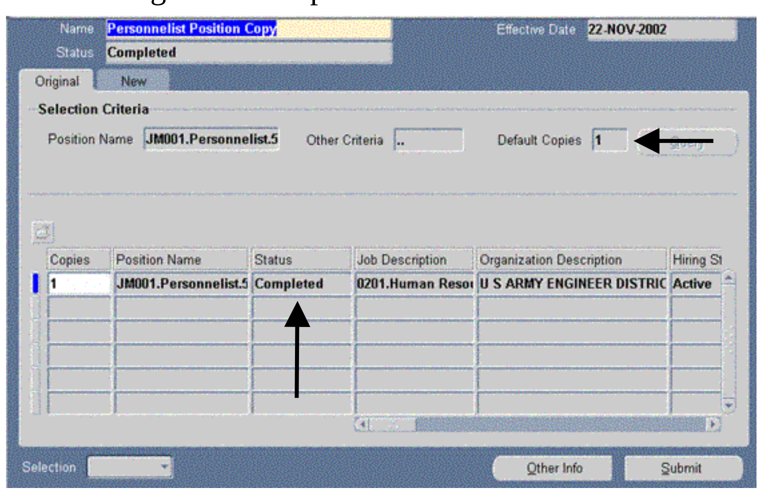
Quick Copying a Position, Continued

Querying the Position to Copy (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>The New window Tab displays the Position data populated in Position Name data field and the Columns populated with the number of positions to copy. The Status data field at the top populates with “Pending New Record(s).”</td></tr>
<tr><td>14</td><td>Click the <Submit> button at the bottom of the window.</td></tr>
<tr><td>15</td><td>A Note displays: Transaction applied and concurrent request _(#)____ submitted. Click the <OK> button.</td></tr>
<tr><td>16</td><td>Go to the Position screen, Query the new position and validate it.</td></tr>
<tr><td></td><td>If the position copy is in the status of “Error New Record(s),” follow procedures for Viewing the Process Log.
• When the position copy is submitted, the system refreshes the position data with the exception of the Change List items and any manual changes you’ve made. It refreshes the data based on the Effective Date.
• The system validates the position using the same validation process it does when you create a position with the Position Window.
You can query the new position in the Position Window and continue making further changes, for example, in Position Extra Information.</td></tr>
<tr><td></td><td>Re-query the position copy name (Personnelist Position Copy) to refresh the status. Press F11, type in Personnelist%, CTRL+F11. The status changes to “Completed.”

</td></tr>
</table>

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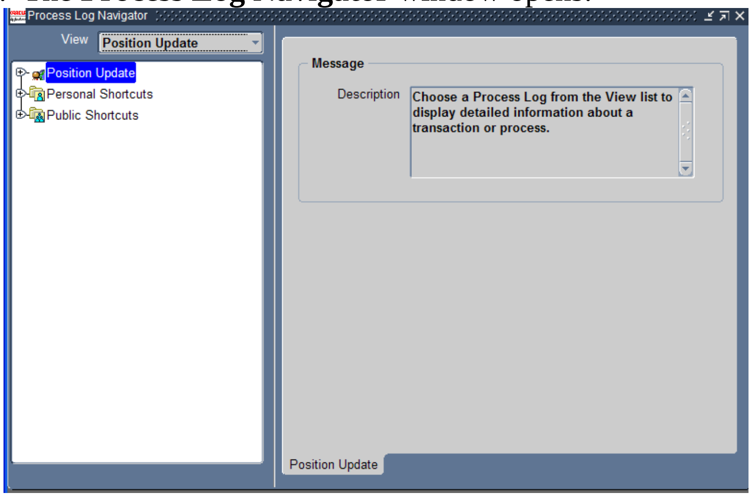
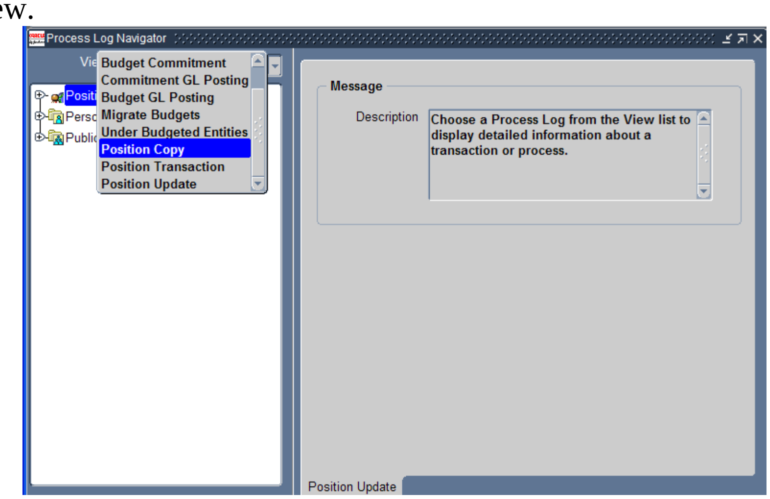
Quick Copying a Position, Continued

Viewing the Process Log

If the status is "Error New Record(s)," use the **Process Log** to view the error message associated with the position copy. The **Process Log** also includes **Position Copy** transactions that completed successfully.

Step	Action
1	**Navigation Path → Federal Maintenance Forms → Process Log**. The **Process Log Navigator** window opens: 
2	Under **View**, click on the drop down list to select **Position Copy** view. 

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Quick Copying a Position, Continued

Viewing the Process Log (continued)

Step	Action
3	Click on the plus sign (+) next to **Position Copy** to view the list of **Position Copy** transactions. • Green Light indicates "Copied" • Red Light indicates"Errors" The error message is shown on the right under Message. This error is related to invalid data associated with the original Position being copied. You need to correct this information on the **Position** window, and then go back to **Position Copy**. • Re-query the **Position Copy** transaction that is in status of Error New Record(s). • On the **Original** Tab, click **Query**. This retrieves the original position with the correct data. • Click on **New** and continue with the position copy.
4	You may delete a position copy transaction if the status is **Pending New Record(s)** or **Error New Record(s)**. Once the status is **Completed**, you are not able to delete the transaction.

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Querying Position Information from the RPA

Purpose

This procedure guides you through the steps for retrieving a list of the positions in your database using the **RPA Appointment** Window.

Information Displayed

The following items display on the list:

- Position Title
- Occupied (Yes/No)
- Pay Plan
- Occ Series
- Grade
- Organization Name
- Position Number
- Position Sequence Number
- Agency Code/Sub Element

Section Contents

- Accessing the RPA
- Using the RPA Appointment Window to Retrieve Position Information

Before You Begin

This method of retrieving position information would normally be used for appointing someone to a position. It is being provided in this section as a handy tool to access the position information in your database by **Position Title**.

Note: You can also access the rest of position flexfields by clicking the <**Position**> Taskflow Button on the RPA Window.

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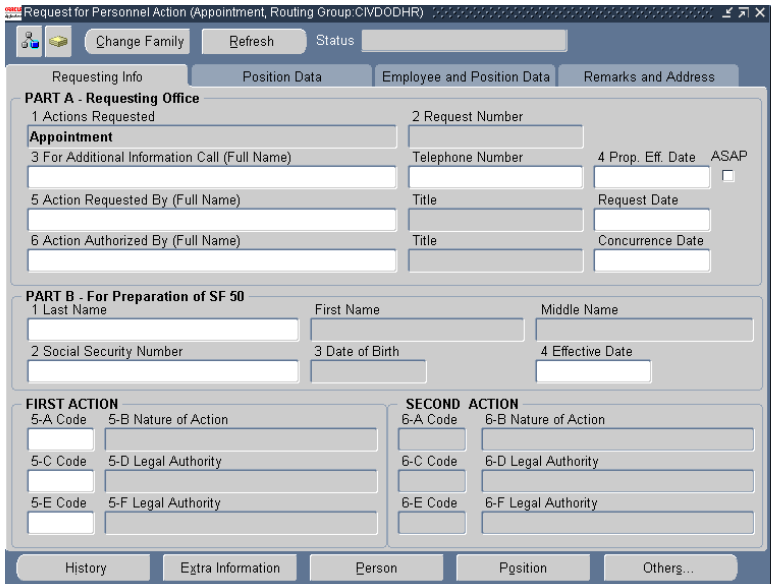
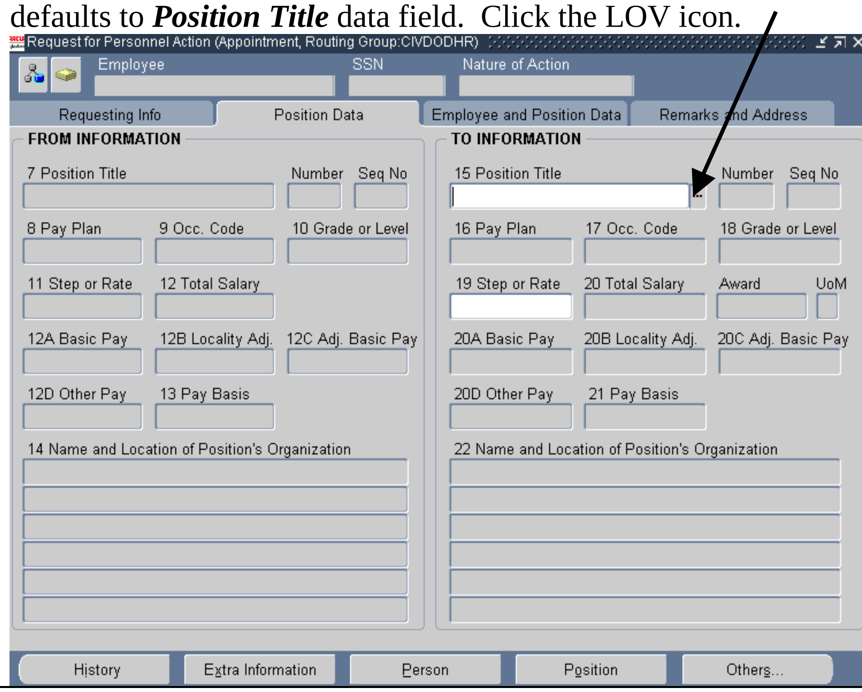
Querying Position Information from the RPA, Continued

Retrieving Position Information by Using Position Title

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path → <i>Request for Personnel Action</i> → <i>Appointment</i> → <Open>. This will open the RPA-Page 1 Requesting Info window.</td></tr>
<tr><td>2</td><td>Click the Position Data tab to access page 2.



</td></tr>
<tr><td>3</td><td>The Position Data window (Page 2 of 4) opens. The cursor defaults to Position Title data field. Click the LOV icon.



</td></tr>
</table>

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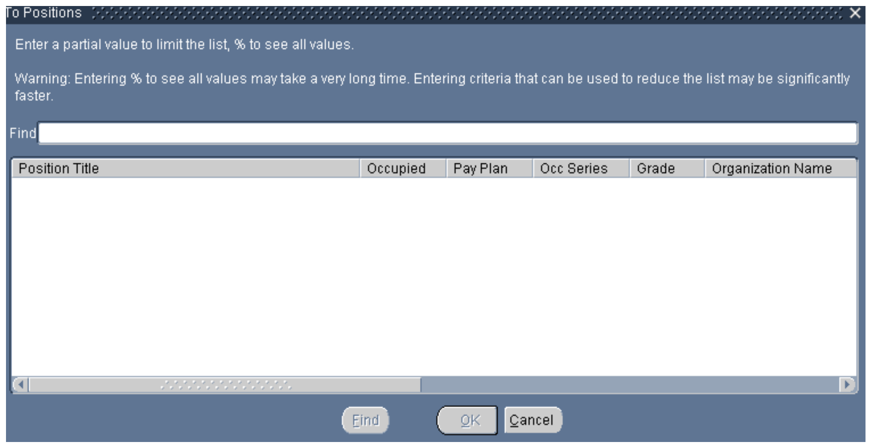
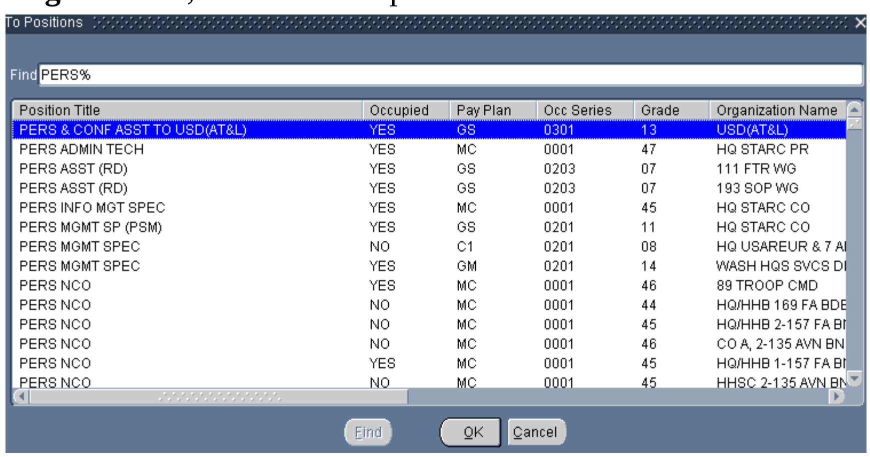
Querying Position Information from the RPA, Continued

Retrieving Position Information by Using Position Title (continued)

Step	Action
4	The Position Title window opens, Enter the first few characters of the title of the positions you want to view, i.e. “Sec” for Secretary or enter a **%** sign to view all positions in your database. Click **<OK>**. 
5	The **To Position** LOV’s window opens. Use the bottom scrollbar to view all the information in the list, in addition to **Position Title**, i.e., **Occupied (Yes/No)**, **Pay Plan**, **Occ Series**, **Grade**, **Organization**, etc. Select the position and click the **<OK>** button 

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Querying Position Information from the RPA, Continued

Retrieving Position Information by Using Position Title (continued)

Step	Action
6	Follow this decision logic table to proceed.

If you do **not** want to view a specific position:	If you **want** to view a specific position:
Click **Cancel** and exit the **RPA** Window, by clicking **Action** on the Main Menu then click **Close Form** to return to the **Navigation List**.	• Click the position you want to retrieve. • Click **<OK>**. The **RPA** Window displays with the ***Position Title*** and ***Position Data*** filled in. To view more information: • Click <**Position**>. The modified **Position** Window displays. • Click the **Descriptive** Flexfield ([ ]) and click **<Others…>** to see the **Extra Information** Flexfields.

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Changing Unencumbered Positions

Purpose

This section guides you through the steps for changing unencumbered positions that have never been occupied. You **"correct"** data if the change is made on the same day as the effective date. You **"update"** data if the change is effective after the effective date.

Section Contents

- Correcting and Updating
- Before You Begin
- Accessing the **Position** Window
- Querying the Position
- Correcting or Updating Position Data

Correcting and Updating Position Data

If you are correcting or updating position information, you need to take into consideration these situations and timeframes:

	Timeframe	Timeframe
Situation	**And, it's the same day (date the position was established), then…**	**And, it's a later date, then…**
Erroneous information was entered while building a position ◆ **Example:** FLSA was initially entered incorrectly.	Retrieve the position and override the data.	Retrieve the position, use the **Alter Effective Date Button** and enter the effective date (the date you built the position). **<u>Correct</u>** the FLSA data by overriding the erroneous data in the position record.
A change occurs to the data that was entered after the position was built.		(date the information becomes in effect, or valid). **"Update"** the data by changing the data in the position record. ***CAUTION*: If you don't reset the date, the next action you take will be effective on the altered date of your last action.**

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Changing Unencumbered Positions, Continued

Correcting and Updating Position Data (continued)

Before You Begin

Caution:

- You should carefully evaluate each data item before changing a position.
- Before making any changes, consider **end dating** or **deleting** and build a new position.

◆ **Examples:** **End Date** ends the record on the date you enter in the ***To*** data field on the **Position** Window. From that date forward, this end date displays in the ***To*** data field.

Deleting removes any history of the record and can only be accomplished on a position that has never been occupied.

Information about locations, organizations, jobs, positions, grades, pay tables, and other work structures is referred to as "**dated"** information as opposed to **"DateTracked'** information used with employee actions. Dated information is maintained in the database to keep a history of actions over time. Previous versions of the position record may be viewed through the use of the **Alter Effective Date** button on the Toolbar.

- Changes to the position record are accomplished through the use of the ***From*** and ***To*** Dates on the **Position** Window :
  - The ***From*** Field is used to show when the date the position becomes effective (or the date established).
  - The ***To*** Field is used to assign an **end date** when you terminate a position.

Notes:

- The ***From*** and ***To*** Fields are not subject to **DateTrack.** The period you enter in these fields remains fixed until you change the values in either data field. There is no **DateTrack History** for position records.

To change "protected data" (assigned organization and job - occupational series) you may use **Quick Copy**. Check the appropriate block to change (organization or job) on the **Quick Copy** Window prior to creating the new position. Otherwise, once a position is created, this becomes protected data and cannot be changed.

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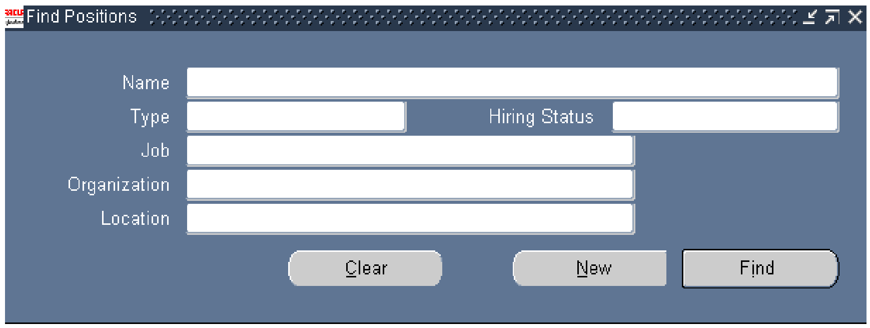
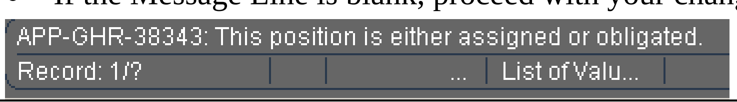
Changing Unencumbered Positions, Continued

Accessing the Position Window

Step	Action
1	**Navigation Path** → *Work Structures* → *Position* → *Description* → **<Open>**.
2	The **Find Position** window opens. 
3	In the **Find Position** window, enter **%** sign to see all positions. The **Position** Window displays the first of all positions in the database. The Message Line displays an arrow indicating there are more positions in the database. Using the up and down arrow keys, or the Page Up or Page Down keys, scroll through the positions until you locate the one you want to modify.

Correcting or Updating Position Data

Step	Action
	Caution: • If the Message Line of the ***Position*** Window says "This position is either assigned or obligated," do **<u>not</u>** proceed with your changes. You must return to the **Navigation List** and follow the process for **Changing Encumbered Positions**. • If the Message Line is blank, proceed with your changes. 

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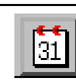
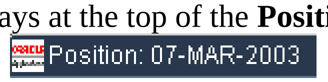
Changing Unencumbered Positions, Continued

Correcting or Updating Position Data (continued)

Step	Action
	Notes: • If you want to verify who encumbers the position, click the **<Occupancy>** Taskflow Button. The **Position Occupancy** Window displays. This folder shows current or past employees with beginning and ending dates for each. Close the window to return to the **Position** Window. • If you want to see information about this position, i.e., Who created the position? When it was created, when and who updated it, etc., click **Help** on the Main Menu Bar and click **About This Record**.
1	Click the **Alter Effective Date** button  if you want to change the **From** date. The **Alter Effective Date** window opens. 
2	Enter the new date and click **<OK>**. The new system date displays at the top of the **Position** Window and in the ***From*** data field. 
3	Click the <**Others**> button. Continue the steps in **Building a Position** to access related descriptive flexfields and key flexfields until all data fields are completed.

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Changing Unencumbered Positions, Continued

Correcting or Updating Position Data (continued) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>After completing the last Extra Position Information Flexfield Window, click Save on the Toolbar.
Click the <Validate> button.</td></tr>
<tr><td>5</td><td>
<table>
<tr><th>If the Position…</th><th>Then…</th></tr>
<tr><td>Doesn’t Validate</td><td>You receive a dialog box with an error message. Retrieve the necessary flexfield(s) and make corrections.
After correcting, click Save and click <Validate> on the Extra Information Flexfield to save your changes and validate the data.
Position Window displays “Valid” in the Status Box.</td></tr>
<tr><td>Validates</td><td>The Status Box on the Position Window shows “Valid.”</td></tr>
</table>
</td></tr>
</table>

To Exit

Click **Action** on the Main Menu Bar and click **Close Form** to return to the **Navigation List**.

Caution: If you changed the effective date for this position change, you must reset the date before proceeding to another action.

Changing Encumbered Positions

Purpose

This section guides you through the process of changing position data on encumbered (occupied) positions. The information in this section applies to the following kinds of position change situations:

- Change an encumbered (filled) position – first incumbent (occupant).
- Change an encumbered position – additional past incumbent(s).
- Change a vacant position with past incumbents.

Section Contents

- Process Definition
- Who Changes Position Information
- Business Rules
- Examples of Changes Generating an NPA
- Requirements for Changing Specific Data Elements
- Accessing the RPA
- Illustration of Change in Data Element (NOA 800)
- Illustration of Change in Duty Station (NOA 792)
- Example of Using the Position Window in Work Structures
  - Accessing the Position Window
  - Querying the Position
  - Changing Competitive Level

Regulatory References

US OPM, The Guide to Processing Personnel Actions (GPPA)

See Also

Module 2, Position Management and Classification Using the DCPDS
Sections,
Building a Position
Querying Positions
Building a Position Hierarchy
Quick Copying a Position
Changing Unencumbered Positions

- Module 3, Processing Requests for Personnel Action Using the DCPDS

Continued on next page

Changing Encumbered Positions, Continued

Process Definition

- Position data elements that appear on **the Notification of Personnel Action (NPA)** cannot be changed on the **Position** Window. They must be processed through the **RPA** using the appropriate **Nature of Action Code (NOAC)**. For example:
    - ***Position Work Schedule*** - Use the RPA and NOAC 781.
    - ***FLSA*** - Use the RPA and process FLSA change in conjunction with appointment or placement action; or, as NOAC 800, Change in Data Element
- Refer to the OPM GPPA to determine the correct NOAC to use for various actions affecting the information on an NPA.
- Position data elements that **do not** appear on the NPA can be changed in two ways, either:
    - On the **RPA** Window using the **Position** Taskflow Button to access the **Position** Window (be sure to datetrack to the date the updated position information takes effect)

      Or
    - In ***Work Structures*** using the data field on the **Position** Window.

Who Can Change Position Information

- Component policies and business rules determine who is assigned this responsibility.
- Position data is usually modified at Regional Service Centers (RSCs) by personnelists given the responsibility. Modification of position data is not done at Customer Service Units (CSUs) or by line managers outside of the civilian personnel community. However, the need to make changes to position data can come from officials in serviced organizations, which may have new workloads, mission changes, or other circumstances that require that positions be modified.

Continued on next page

Changing Encumbered Positions, Continued

Business Rules

- You cannot **delete** positions that are encumbered.
- To cancel an encumbered position, the position must be end-dated (to accurately maintain assignment history), and the employee separated or moved to another position.
    - If the end-date is a **future date**:
        - You can add or change this date while the employee continues to encumber the position. If the employee continues to encumber the position once the end-date has passed, you will receive a daily alert to move the employee from the position.
    - If the end-date is a **current** or **past date**:
        - The incumbent must be moved from the position before the position can be end-dated.

Examples of Changes Generating an NPA

The following position changes are examples of actions that must be done via the RPA for encumbered positions, because they require production of an NPA.

Nature of Action (NOA)	RPA Position Actions	Process Definition
781	Change in Work Schedule	A change in the work schedule or time basis on which an employee is paid, including change between seasonal and non-seasonal work schedules.
782	Change in Hours	A change in the total number of hours during that day that a part-time employee is scheduled to work.
792	Change in Duty Station	A change in an employee's official duty station or work site.
800	Change in Data Element	A change in ***Bargaining Unit Status***, ***FLSA Category***, ***Personnel Office ID, etc.***

Continued on next page

Changing Encumbered Positions, Continued

Requirements for Changing Specific Data Elements

Data Element	Associated Requirements
JOB	DCPDS will not allow the "**Job**" (the occupational series) assigned to a position to be changed once a position is created and saved. When a position is encumbered, an NPA will always be required to move the employee to a different position. The NOA will vary depending upon the circumstances. Refer to the GPPA.
ORGANIZATION	For vacant or encumbered positions, the position can be realigned through Mass Actions, with **NOA 790 Realignment** *Or* If organizational information is updated on the **Organization** Window, that information will automatically "flow" to all of the positions in the organization. **Note:** OPM does not require that such a change be documented with a personnel action NPA, but neither does it prohibit such documentation.
LOCATION	The duty location of the position must be identical with that of the assignment of the employee who encumbers the position. **Note:** OPM requires that a change in position/assignment location be documented with a personnel action with NOA **792 -Change in Duty Station**, if no other changes occur simultaneously. A list form of the NPA may be used if the change affects a large number of employees/assignments.
VALID GRADE	Changes in ***Grade***, ***Pay Plan***, *or* ***Pay Basis*** in an encumbered position always require an NPA.

Continued on next page

Changing Encumbered Positions, Continued

Before You Begin

- The primary sources of information for position data changes are the RPA and the position description.
- Once in the RPA, the **Position** Window is the same as the one used in ***Work Structures*** to build a new position except <**Extra Information**> Taskflow Button has been added. Three Taskflow Buttons (<**Occupancy**>, <**Quick Copy**>, and **<Others>**) are not available. The buttons and fields on the **Position** Window are described in the procedure steps of **Building a Position** in this module.
- If the position is moving to a new organizational location, the new **Organizational Hierarchy** must be established before you can move the position.
- If you wish to change a position after you build it, and the position is being used on an RPA, you will need to **alter the effective date** of the RPA action to make your position change. Otherwise, the RPA will not recognize the change.

Note: Remember to reset the **alter effective date** back to the current date before proceeding with another action.

Caution: You should carefully evaluate each data item before changing a position.

Continued on next page

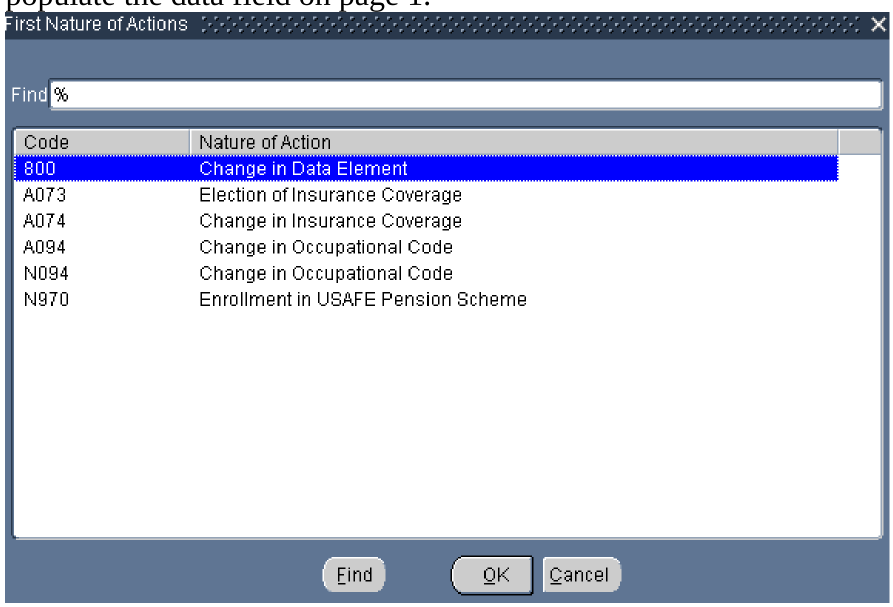
Changing Encumbered Positions, Continued

Accessing The RPA

Follow this path to access the RPA. **Navigation Path** → *Request for Personnel Action* → *Change Actions* → *Change in Data Element* → <**Open**> to display the **RPA – Page 1** with the selected action listed in the ***Actions Request*** data field.

Illustration of Change in Data Element (NOA 800)

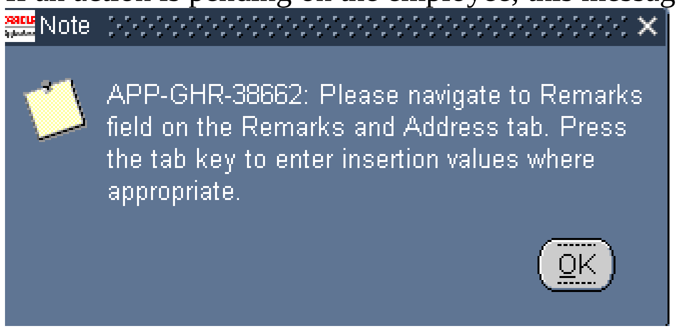
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Use the procedures listed in Module 3, Request for Personnel Action, Chapter 2, Completing the RPA to complete Page 1 of the RPA.</td></tr>
<tr><td>2</td><td>With your cursor in the First Action Region of <i>5-A Code</i> data field click the LOV icon to display the First Nature of Actions window. Select the correct Nature of Action and click <OK> to automatically populate the data field on page 1.

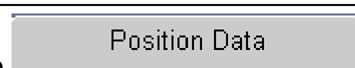

</td></tr>
</table>

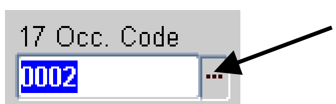
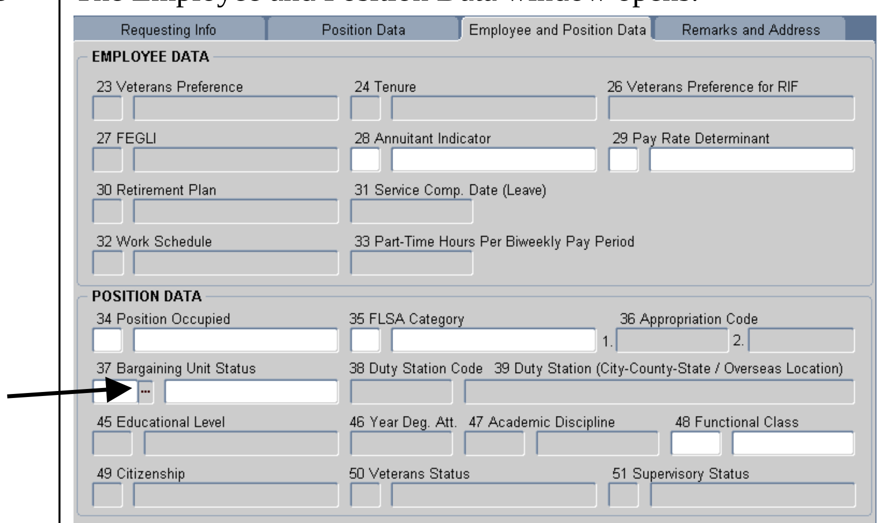
Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Data Element (NOA 800) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>If an action is pending on the employee, this message will display.


Click the <OK> button.</td></tr>
<tr><td>4</td><td>Click the Position Data tab 

In the To Information side of the position Data form.
Click the LOV’s icon and select an Occ. Code. Click the<OK>button

</td></tr>
<tr><td>5</td><td>The Employee and Position Data window opens.


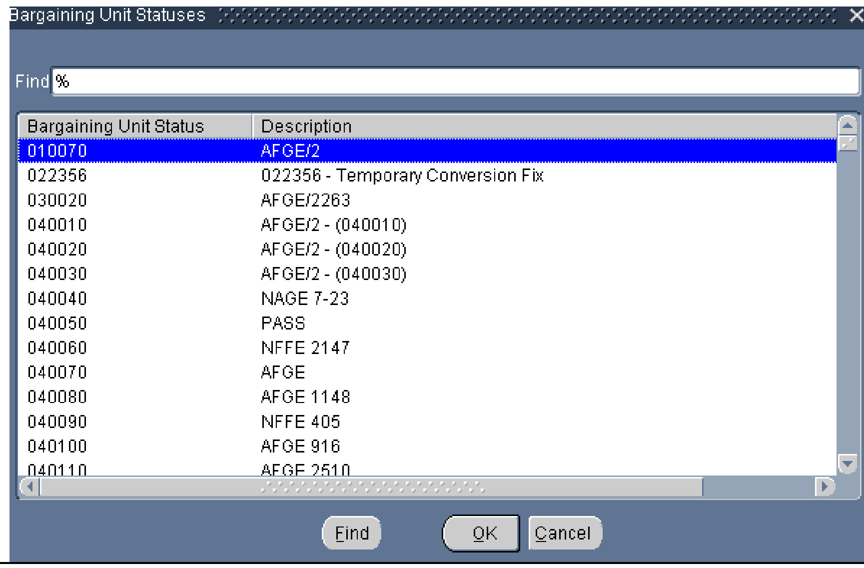
For example, Click the LOV’s in the Bargaining Unit Status data field on page 3. to display a listing.</td></tr>
</table>

Continued on next page

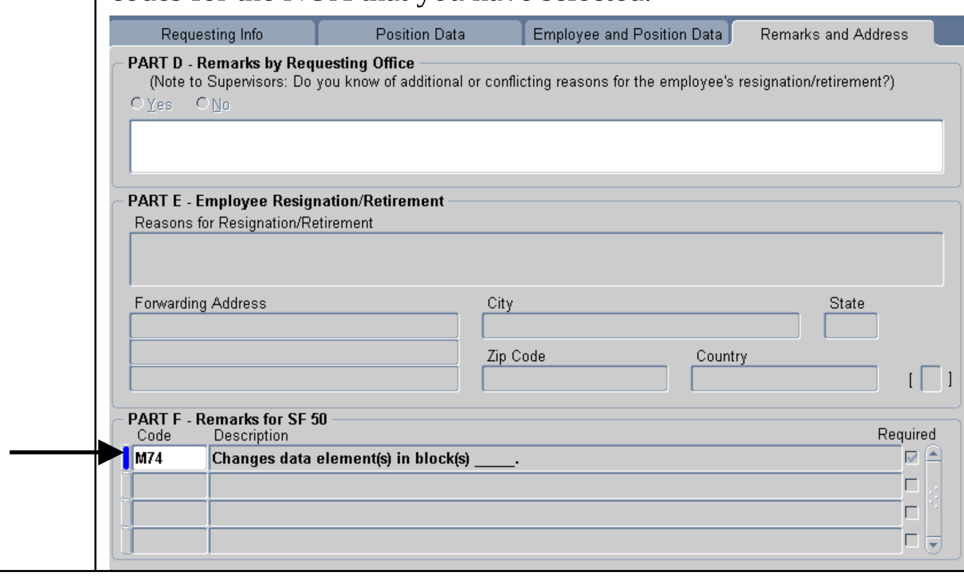
Changing Encumbered Positions, Continued

Illustration of Change in Data Element (NOA 800) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Select the correct code, and click the <OK> button to automatically populate the data field.



</td></tr>
<tr><td>7</td><td>Click the Remarks and Address tab to display Page 4 of the RPA. In Part F – Remarks for SF-50 Region, place your cursor in the Code data field. Click the LOV icon for a listing of appropriate codes for the NOA that you have selected.

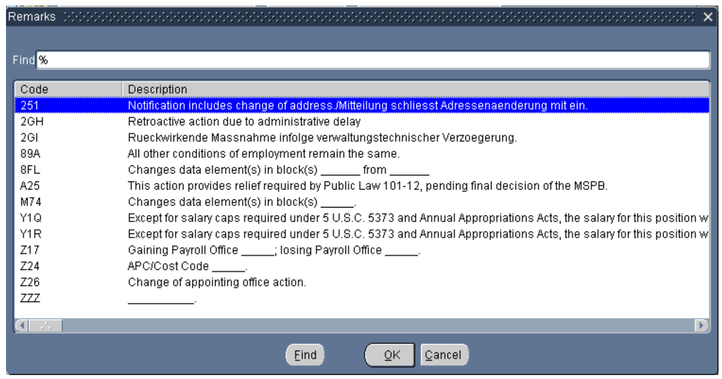
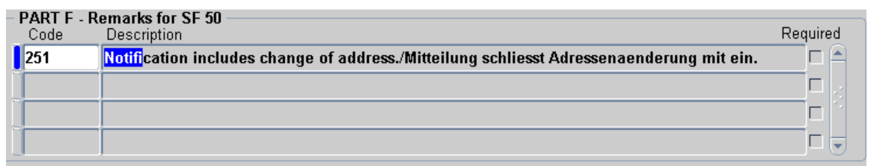
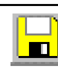
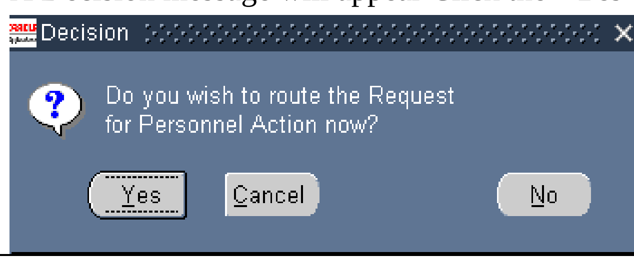


</td></tr>
</table>

Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Data Element (NOA 800) (continued)

Step	Action
8	Select the PA Remarks value and click the **<OK>** button to automatically populate the data field.  
9	Click the Save  button on the Toolbar.
10	A Decision message will appear Click the <**Yes**> button. 

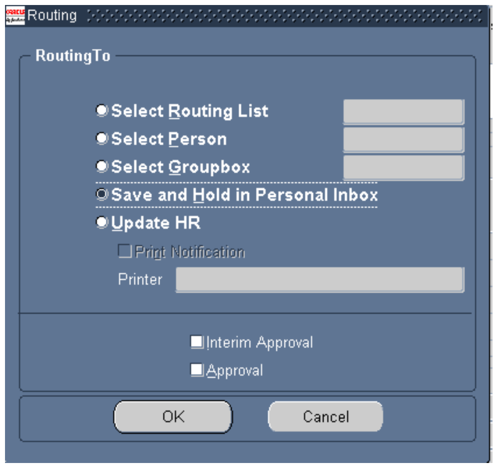
Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Data Element (NOA 800) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>

Route the action to the correct Approving Official’s Workflow Inbox and click <OK>. (After everyone in the routing group has given approval, the last one will submit to **Update HR)**



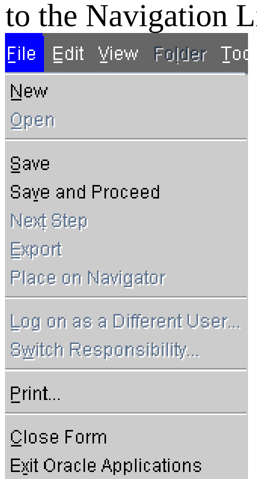
Caution: The RPA must be saved to your inbox prior to Updating HR. If not, you will <u>not</u> be able to locate it when you query closed actions in the future.

</td></tr>
<tr><td></td><td>

The **Message Line** indicates the change is saved and displays at the bottom of the **RPA – Page 4**.

</td></tr>
<tr><td>12</td><td>

To Exit, Click **File** on the Main Menu then click **Close Form** to return to the Navigation List.



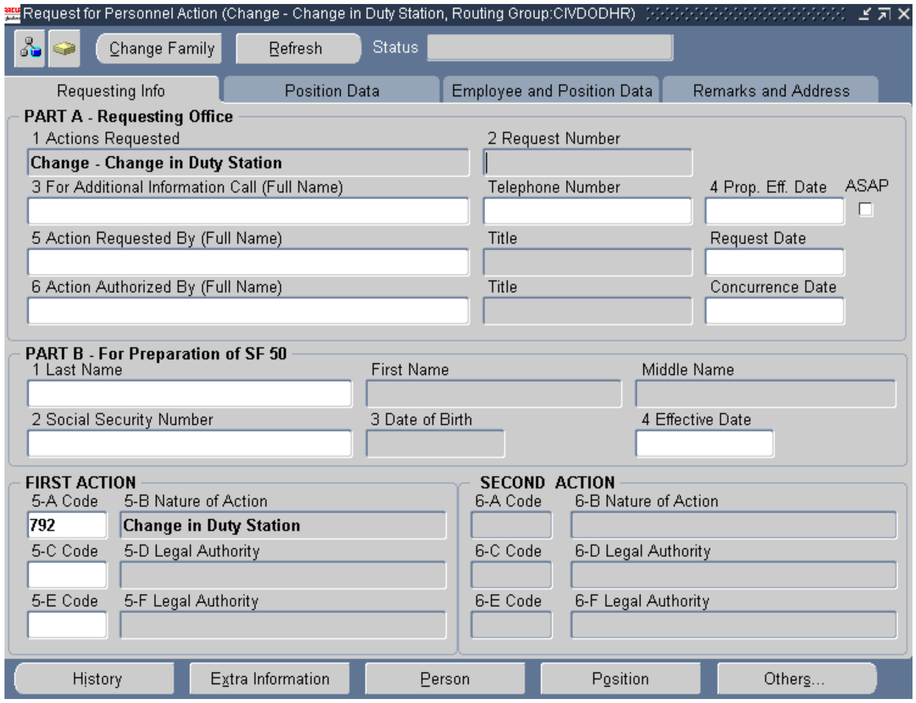
</td></tr>
</table>

Changing Encumbered Positions, Continued

Illustration of Change in Duty Station (NOA 792)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Navigation Path → *Request for Personnel Action* → *Change Actions* → *Change in Duty Station* → <**Open**> the **RPA – Page 1** with the selected action listed in the ***Actions Requested*** data field.



Use the procedures listed in Module 3, Processing Requests for Personnel Actions Using the DCPDS, Chapter 1, Processing a Request for Personnel Action to complete Page 1 and Page 2 of the RPA. Also, follow the procedures listed in Change of Data Element (NOA 800). Click the Employee and Position Data tab to display page 3.

</td></tr>
<tr><td>2</td><td>

The ***Duty Station*** data field is highlighted.

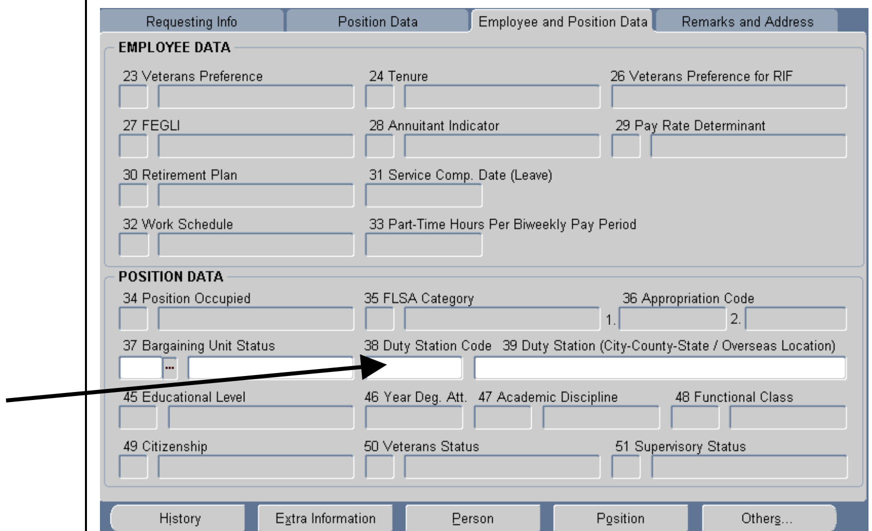
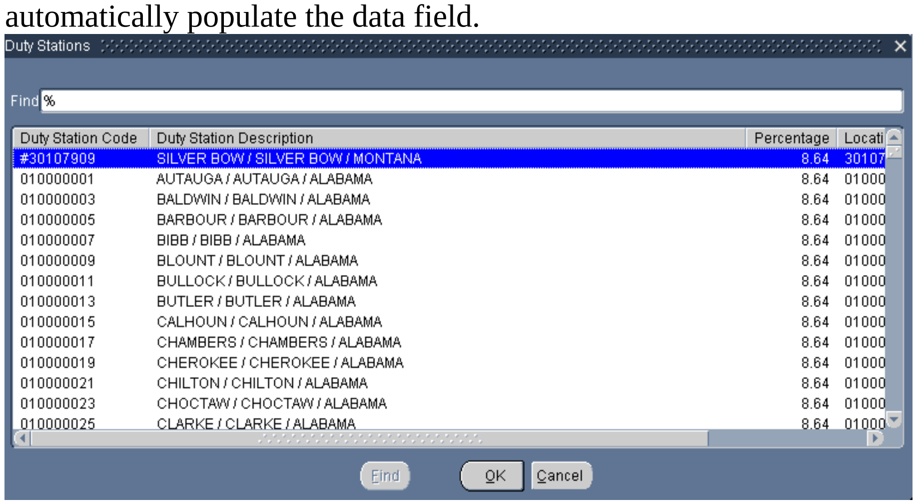
Note: The ***Bargaining Unit Status (BUS)*** data field may have to be changed along with ***Duty Station*** data field.

</td></tr>
</table>

Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Duty Station (NOA 792) (continued)

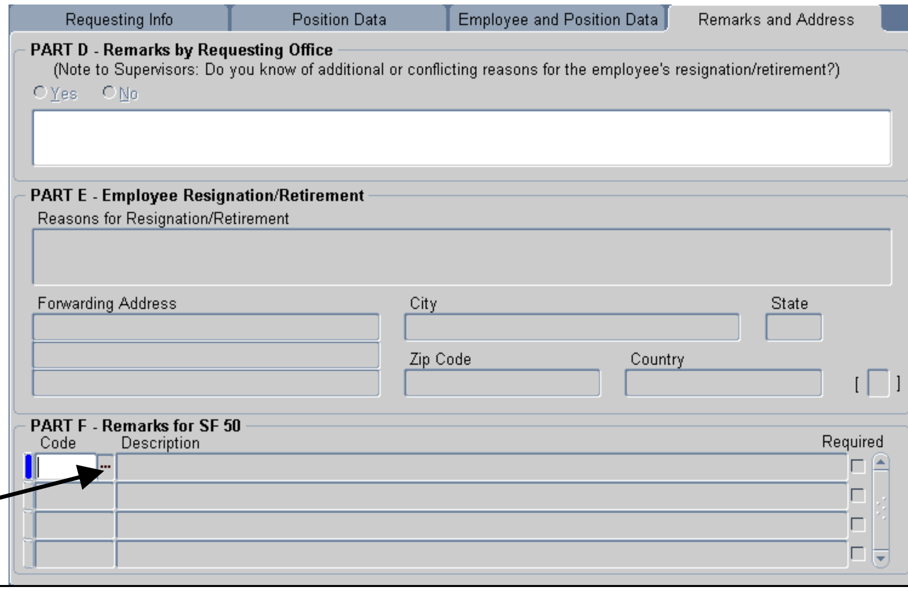
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Place your cursor in the Duty Station Code data field. Click the LOV's icon

</td></tr>
<tr><td>4</td><td>Select the new duty station and click the <OK> button to automatically populate the data field.

</td></tr>
</table>

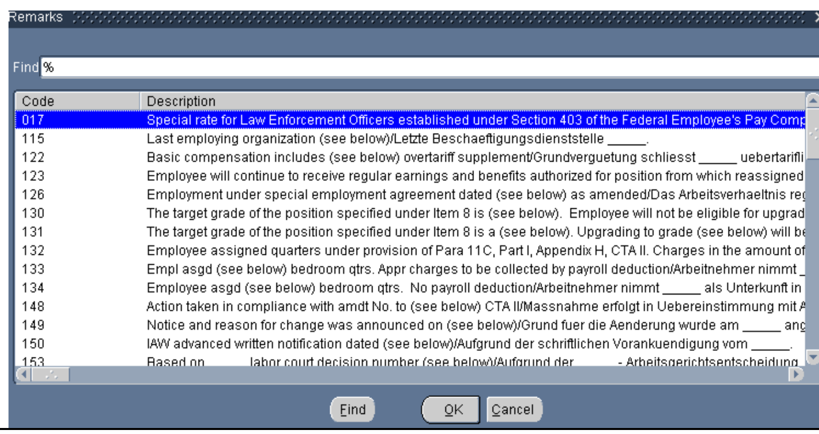
Continued on next page

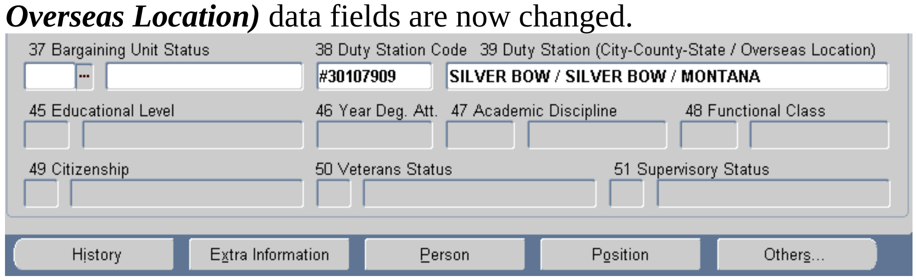
Changing Encumbered Positions, Continued

Illustration of Change in Duty Station (NOA 792) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The Remarks and address window opens, click the LOV’s icon


</td></tr>
<tr><td>6</td><td>Select the remark code and click the <OK> button

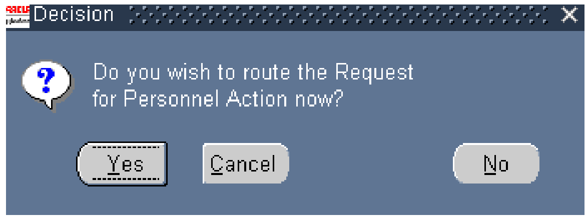
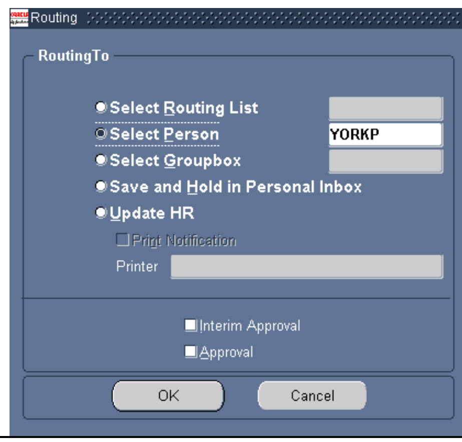
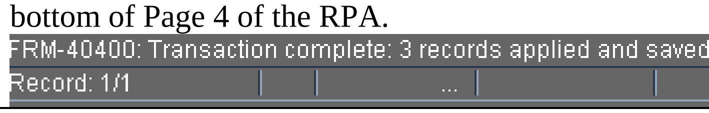
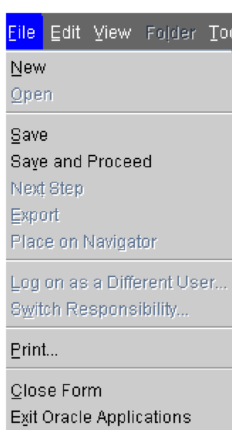

</td></tr>
<tr><td>7</td><td>The Duty Station Code and Duty Station (City-County-State or Overseas Location) data fields are now changed.



Click <Save> button</td></tr>
</table>

Continued on next page

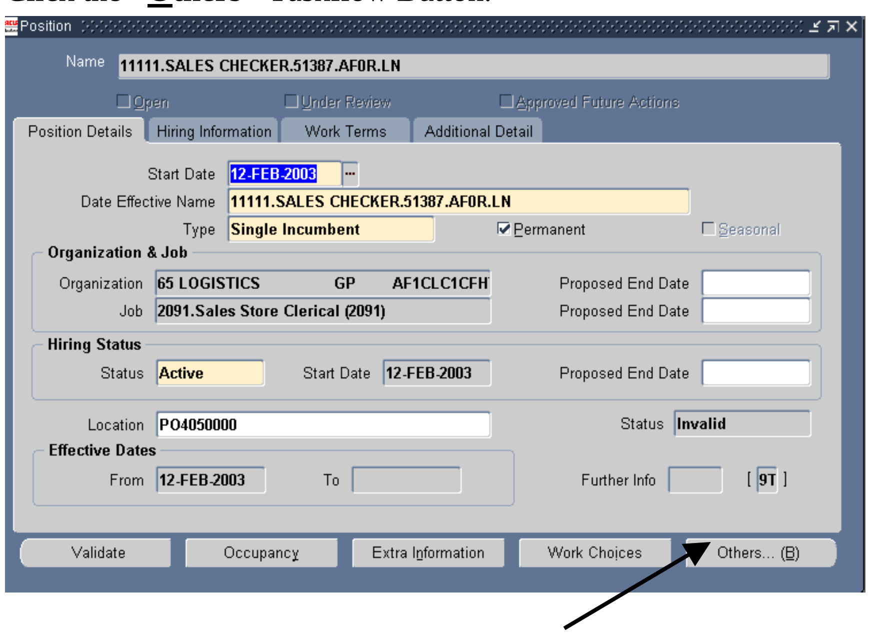
Changing Encumbered Positions, Continued

Step	Action
8	A decision message displays Click the <**Yes**> button.  **Caution:** The RPA must be saved to <u>your</u> Civilian Inbox before processing to Update HR. If not, you will <u>not</u> be able to locate it when you query closed actions in the future.
9	Select the person to route the action to. (After everyone in the routing group has given approval, the Approving Official will submit to **Update HR**.) 
10	The Message Line indicates the change is saved and displays at the bottom of Page 4 of the RPA. 
11	To Exit, Click **File** on the Main Menu then click **Close Form** to return to the Navigation List. 

Changing Encumbered Positions, Continued

Accessing the Position Window **Navigation Path** → *Work Structures* → *Position* → *Description* → **<Open>**.

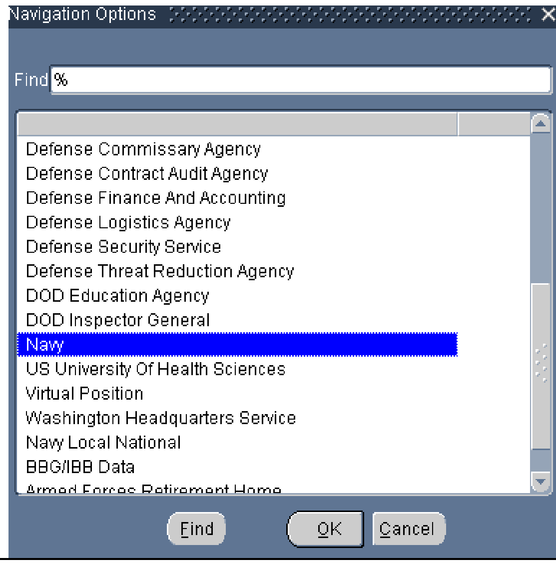
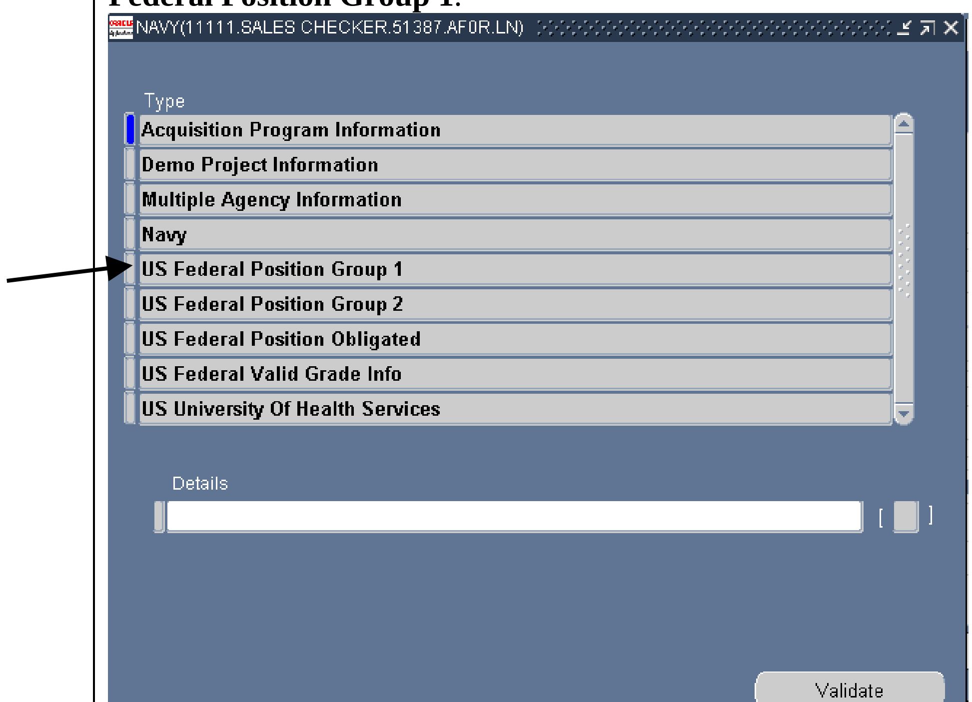
Querying the Position

Step	Action
1	Enter a partial PD Number (ex. E7038%). Click the<**find**> button 
2	Click the <**Others**> Taskflow Button. 

Continued on next page

Changing Encumbered Positions, Continued

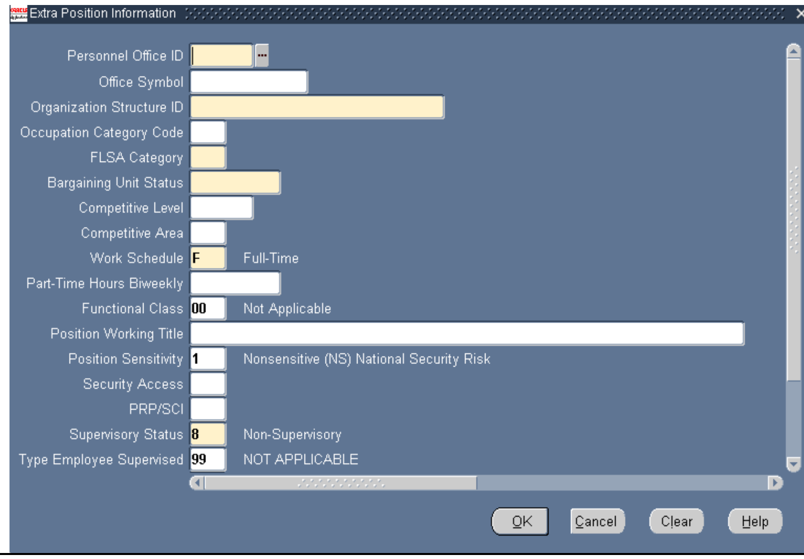
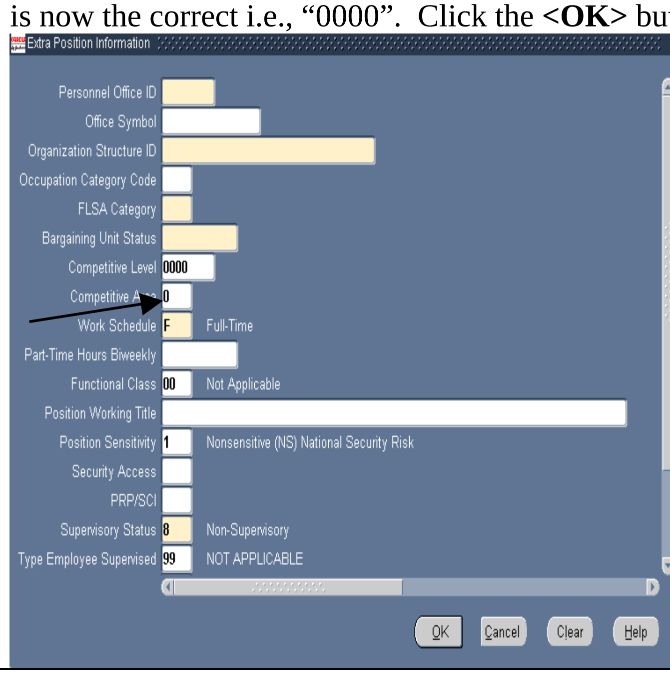
Changing Competitive Level

Step	Action
3	The **Navigation Options** window opens. Select the Agency that you need, i.e. “Navy”. Then click the <**OK**> button. 
2	The **Extra Position Information** window opens. Select **US Federal Position Group 1**. 

Continued on next page

Changing Encumbered Positions, Continued

Changing Competitive Level (continued)

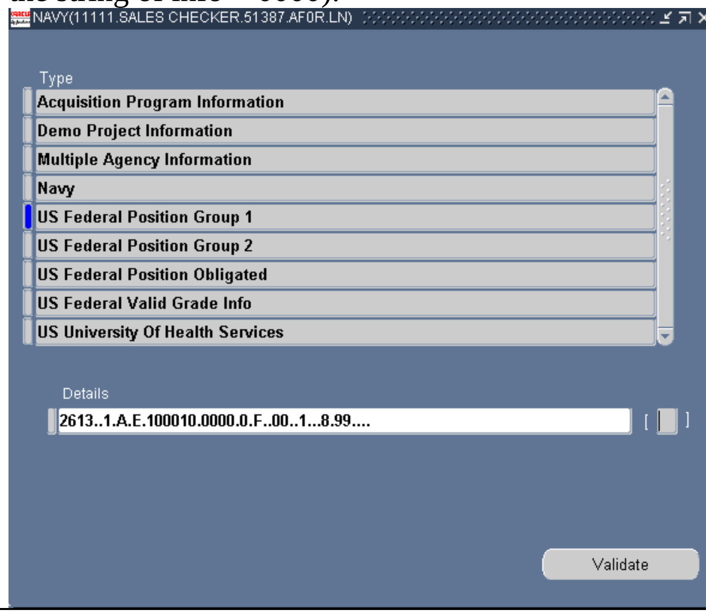
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Double Click Details data field. The Extra Position Information window opens with previously completed information entered.

</td></tr>
<tr><td>4</td><td>Place your cursor in Competitive Level data field. Enter your data that is now the correct i.e., "0000". Click the <OK> button.

</td></tr>
</table>

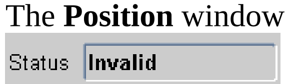
Continued on next page

Changing Encumbered Positions, Continued

Changing Competitive Level (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The Extra Position Information displays with the new Competitive Level reflected in the Details box (sixth data field in the string of info = 0000).



</td></tr>
<tr><td>6</td><td>Click Save  icon. And close the Extra Position Information window.</td></tr>
<tr><td>7</td><td>The Position window opens. If the Status data field says 

"Invalid," click the <Validate> button and correct any data required until the <i>Status</i> data field is "Valid."</td></tr>
<tr><td>8</td><td>To Exit, Click File on the Main Menu then click Close Form to return to the Navigation List.

</td></tr>
</table>

Terminating and Deleting a Position

Purpose

This section explains how to terminate or delete a position. The required steps depend on whether the position is encumbered or has been occupied.

Section Contents

- Before you begin
- Terminating a Position
- Deleting a Position

Who Does This Process

You must be assigned a role in the personnel area to perform this function or assigned this role by your Component.

Before You Begin

Things to consider before terminating or deleting a position and the differences.

When to "Terminate"	When to "Delete"
It is not encumbered.	It is not within a hierarchy.
You want to use it again.	It has never been occupied.
You want to keep historical data.	It isn't being used by an RPA.
Note: A new sequence number will be assigned.	**Note:** All historical data is removed, but the sequence number never goes away.

Continued on next page

Terminating and Deleting a Position, Continued

Deleting a Position

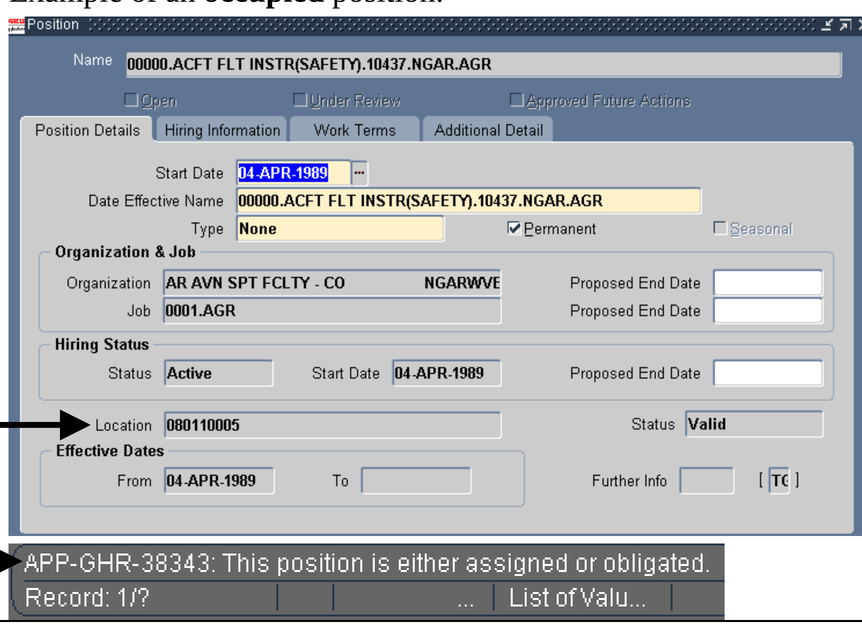
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Navigation Path → <i>Work Structures</i> → <i>Position</i> → <i>Description</i> → <Open>. The Find Position window opens.

Enter the position number you wish to terminate.</td></tr>
<tr><td>2</td><td>Type in an end date in the Proposed End Date data field of the Dates Region of the position record. The date may be a past, current, or future date. Retrieve the position you wish to terminate.

Note: If this date is a past or current date, you should ensure that no one is assigned against the position before you end date it. See "Before you begin" at the beginning of this section for additional information.

• <u>Helpful Hint</u>: You will know the position is occupied if Location is grayed out, as well as the Message Line at the bottom of the window.

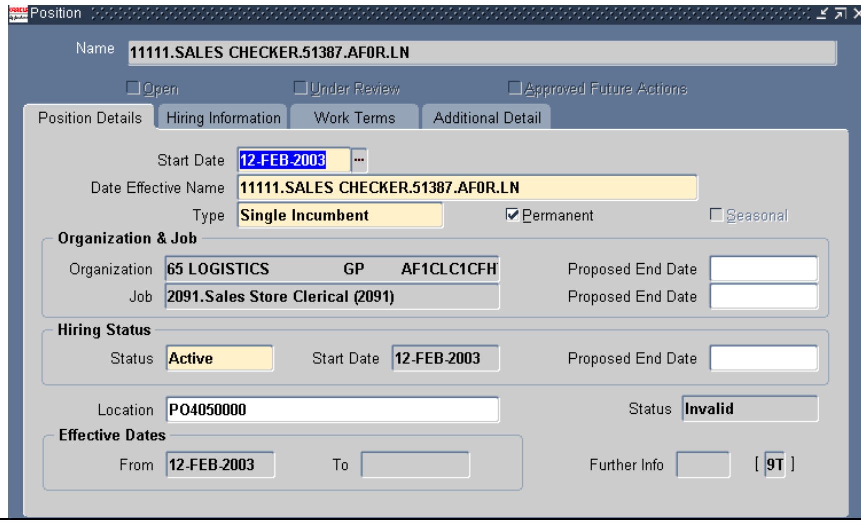
Example of an occupied position:


</td></tr>
</table>

Continued on next page

Terminating and Deleting a Position, Continued

Deleting a Position (continued)

Step	Action
	Note: If the position is occupied, the system will send a daily reminder to take an action on the employee on and after the **"To"** Date.
3	Example of an Unoccupied Position (***Location*** is **not** grayed out): 
4	Click **Save**. The Message Line indicates: "Transaction complete: 1 records applied and saved."
5	Exit the **Position** Window by clicking File on the Main Menu then and click **Close Form** to return to the **Navigation List**.

Deleting a Position

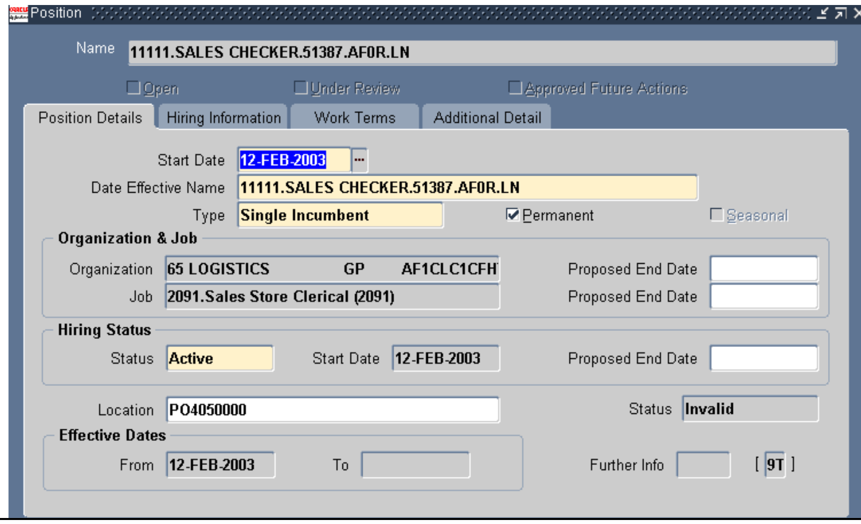
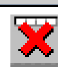
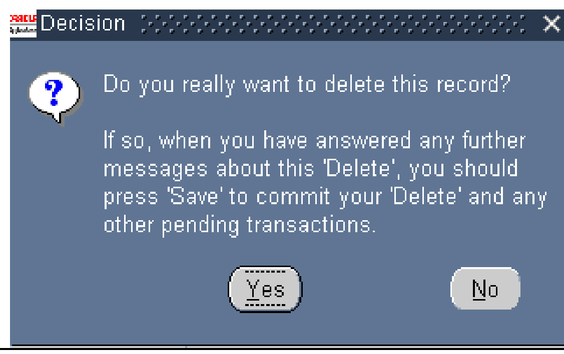
If the position is in a hierarchy, follow the process in **Deleting a Position from a Position Hierarchy** in this module. If not, follow these steps to delete a position that has never been occupied or is not being used by an RPA.

Step	Action
1	**Navigation Path** → *Work Structures* → *Position* → *Description* → <**Open**>. The **Find Position** window opens.
2	Retrieve the position you wish to delete by using the Querying function. Place the cursor in the ***Name*** data field and enter a partial value of the position, ex: %JI123%. Click **View** → **Query by Example** → **Enter** → **Run**.

Continued on next page

Terminating and Deleting a Position, Continued

Deleting a Position (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The queried position auto populates the Position Window.

</td></tr>
<tr><td>3</td><td>Click the Delete  button on the Toolbar.</td></tr>
<tr><td>4</td><td>A Dialog Box displays asking if you really want to delete this record. Click <Yes>.

</td></tr>
</table>

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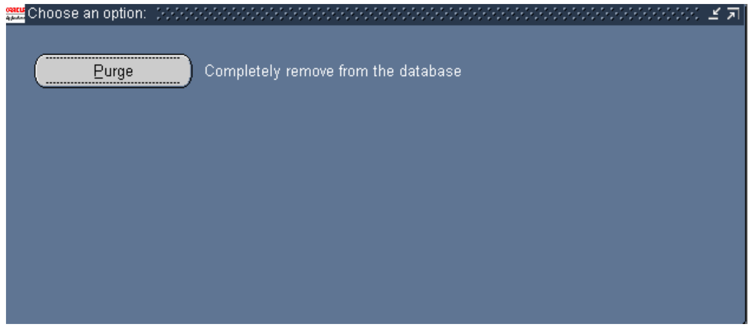
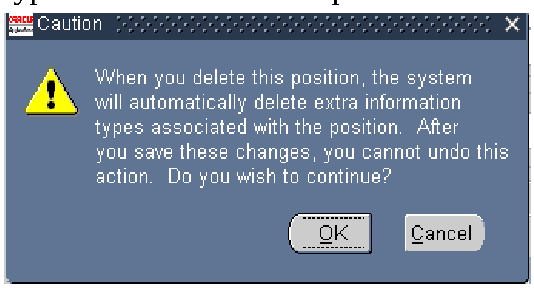
Terminating and Deleting a Position, Continued

Deleting a Position (continued)

Step	Action
5	A Dialog Box open with opens explaining the system will completely remove the position from the database.  Click the <PURGE> button.
	After clicking the Purge button a Caution box will appear explaining the system will automatically delete extra information types associated with the position.  Click the <OK> button.
6	Click the Save icon complete the removal of the position
8	To Exit, Click **File** on the Main Menu then click **Close Form** to return to the Navigation List.